

**CITY OF LEON VALLEY  
REQUEST FOR PROPOSALS (RFP)  
INSURANCE AGENT OF RECORD**

**OVERVIEW**

The City of Leon Valley, Texas is soliciting Requests for Proposals (RFP) for an **Insurance Agent of Record** for the City's employee in-group healthcare cost management for its group life, medical, dental and supplemental insurances. The City of Leon Valley employs one-hundred eight (108) full-time regular employees.

The purpose of this RFP process is to secure the services of an independent **Insurance Agent of Record** to assist the City in the overall management of its insurance employee benefits program.

**SCOPE OF SERVICES**

The Insurance Agent of Record responsibilities include, but are not limited to the following:

- A. Provide the leadership skills necessary to take advantage of effective products and services developed by the industry.
- B. Prepare bid specifications, handle negotiations for all renewals, analyze bids received and negotiate with carriers to obtain best contractual terms and rates possible for the City.
- C. Assist the City with fiscal budget and premium funding projections.
- D. Provide the City with overall plan management and quality assurances services in plan administration, benefit design, customer service, cost containment and regulatory compliance.
- E. Provide ongoing, day-to-day service activities necessary to assure overall plan satisfaction. This includes employee intervention and on-site trouble-shooting and enrollment assistance with the employees.
- F. Ensure the City of Leon Valley is maintaining its compliance with the Patient Protection and Affordable Care Act (PPACA), commonly called the Affordable Care Act (ACA)
- G. Assist the City of Leon Valley in maintaining its compliance with the Consolidated Omnibus Budget Reconciliation Act (COBRA).
- H. Assist the City of Leon Valley in maintaining its compliance with the Health Insurance Portability and Accountability Act of 1996 (HIPAA)
- I. Provide any additional services that assist the City in maintaining low insurance premiums (i.e. Wellness Programs).

## SUBMISSION REQUIREMENTS

- A. A brief statement as to why the consultant is uniquely qualified to provide services to the City of Leon Valley.
- B. Address the issue of staff availability for servicing the City. It is essential that the Insurance Agent of Record be available to the City whenever necessary.
- C. Provide a list of three (3) current group health clients, two (2) of which must be public entities or municipalities (notate public entities). You must provide contact name, phone number, email address, number of employees, and length of time as a client.
- D. Provide a list of three (3) group health clients that no longer utilize your services (notate public entities). You must provide contact name, phone number, email address, number of employees, and length of time as a client.
- E. If available, provide letters of recommendations from existing and/or past clients.
- F. Submit a completed Conflict of Interest Questionnaire (CIQ) form found [HERE](#). *You may also copy and paste the following in your web browser:*  
<https://www.ethics.state.tx.us/forms/CIQ.pdf>. For your reference, a list of City Council and City Staff Officials is available at the end of this document.
- G. Provide a résumé or biography of the person that will be assigned to the City.
- H. An explanation of how the city will compensate you for your services (see page 4).

## EVALUATION CRITERIA

Proposals will be evaluated utilizing the criteria summarized below:

- A. Content, technical approach and understanding of the scope of the project, to include information on ACA, HIPPA, COBRA and any additional services ..... 30 points
- B. General quality and adequacy of response ..... 25 points
- C. Qualifications in providing similar services ..... 15 points
- D. Experience of designated city representation ..... 15 points
- E. Overall project design, price, and methodology ..... 15 points

## ADDITIONAL INFORMATION

The Insurance Agent of Record shall always put the City of Leon Valley's interests first and may not knowingly or intentionally make decisions regarding the City based on personal pecuniary interest.

The successful vendor shall submit a Texas Ethics Commission Form 1295 found [HERE](#) (filed online and submitted upon request)

*Or you may also copy and paste the following in your web browser*

<https://www.ethics.state.tx.us/forms/1295.pdf>

All questions shall be directed to Crystal Caldera at [c.caldera@leonvalleytexas.gov](mailto:c.caldera@leonvalleytexas.gov) or at 210- 684-1391, ext. 212.

## **DELIVERABLES**

For consideration, one (1) original and nine (9) copies of your proposal must be provided in a sealed envelope or container, clearly marked "**RFP Insurance Agent of Record**", and submitted to:

Crystal Caldera, Director of Human Resources  
City of Leon Valley  
6400 El Verde Road  
Leon Valley, TX 78238

Submissions are due no later than **12:00 p.m., Tuesday, June 12, 2018** and shall remain valid for a minimum of sixty (60) days. Submissions received after this time will be returned unopened. The City of Leon Valley reserves the right to reject any and all responses.

**SUBMISSION REQUIREMENTS, Item H, “An explanation of how the city will compensate you for your services”.**

**Please answer the following:**

- 1) How will you be compensated for your services? If you are being compensated by commission, who pays your commission and what is your rate?

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- 2) Is there any other monetary or non-monetary compensation for your services, if you are named the City of Leon Valley’s Insurance Agent of Record for the employer provided employee group health plan?

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## **CITY COUNCIL and CITY OFFICIALS**

### **CITY COUNCIL MEMBERS**

Chris Riley	Mayor
Dr. David Edward	Council Place 1
Dr. Cathrine Rodriguez	Council Place 2
Monica Alcocer	Council Place 3
Benny Martinez	Council Place 4
David Jordan	Council Place 5

### **STAFF MEMBERS**

Kelly Kuenstler	City Manager
Saundra Passailaigue	City Secretary
Vickie Wallace	City Accountant
Joe Salvaggio	Chief of Police
Luis Valdez	Fire Chief
Melinda Moritz	Public Works Director
Brandon Melland	Planning & Zoning Director
Sandy Underwood	Library Director
Crystal Caldera	Assistant City Manager/ Human Resources Director